

APPENDIX V INSTRUCTIONS FOR DD FORM 2631

Instructions are provided below for items which are not self-explanatory.

- Item 3a. PHASE OF COMPLETION. Check the "interim" box for any performance evaluation made prior to completion of the design or engineering services phase, or construction phase, and enter the percent of completion of the phase. The usual instances for interim evaluations are: (1) when performance is marginal or unsatisfactory; (2) annual progress evaluations when the performance period exceeds 18 months; or (3) a project is deferred for more than 3 months and substantial work has been completed. Check "Final" if the evaluation is made at the completion of a project phase (i.e., design or engineering services phase, or construction phase).
- Item 3b. COMPLETION. Check "Design" if the A-E services are for design of construction. Check "Engineering Services" if the A-E services are not directly associated with the design of a construction project. Check "Construction" for the evaluation of A-E services during construction.
- Item 5. DELIVERY ORDER NUMBER(S). Only applicable for ID contracts. (The correct term on the form should be "task order" which applies to services, not "delivery order" which applies to supplies.)
- Item 6. NAME AND ADDRESS OF A-E CONTRACTOR. Show primary performing office, which may not be the office which signed the contract.
- Item 7b. DESCRIPTION OF PROJECT. For HTRW projects, indicate the phase in which the A-E firm assumed responsibility for the project.
- Item 8. NAME, ADDRESS AND PHONE NUMBER OF OFFICE RESPONSIBLE FOR. An example for Item 8a is shown below:
- Engineering Division
Savannah District
Savannah, GA
912/944-5465
- Item 9a. TYPE OF WORK PERFORMED BY A-E (DESIGN, STUDY, ETC.). For HTRW projects, indicate if performance type specifications were required.
- Item 9d. PROFESSIONAL SERVICES CONTRACT. The "initial A-E fee" should include the basic contract or task order amount plus any options awarded before the time of the evaluation. Do not include contract or task order modifications in the initial fee amount. "A-E contract modifications" should include all additional work not negotiated at the time of the contract or task order award. The "total A-E fee" is the sum of the initial fee and the modification
- Items 9f,g. NEGOTIATED/ACTUAL A-E CONTRACT COMPLETION DATE (OR NUMBER OF DAYS). Report either negotiated/actual completion dates or number of days, not both. Include authorized contract extensions. The "number of days" is the total period negotiated for performance of the work and does not include Government review time, other design stop periods, or other Government-caused delays.

- Item 11. A-E LIABILITY. Indicate status of A-E liability at time of completing the form. Check "NONE" if there are no known deficiencies, or if there are and the KO has decided not to take action. Check "UNDETERMINED" if there are deficiencies and a determination on liability has not been made. Discuss in Item 20. Check "PENDING" if the contracting officer has determined that action will be taken to recover damages from the A-E firm and enter the amount of damages. Check "SETTLEMENT" if a liability case(s) against the A-E has been settled and enter the amount recovered. "UNDETERMINED", "PENDING", and "SETTLEMENT" may be concurrently marked.
- Item 12. OVERALL RATING. See guidance in Chapter 6, paragraph 6.4.e of this pamphlet. The overall rating shall be determined through an assessment of ratings of performance elements in Items 16 through 19, and any other significant factors not covered by the performance elements. Explain in Item 20 which disciplines and attributes are significant if not readily apparent from the nature of the work.
- Item 14a. NAME, TITLE AND OFFICE OF RATING OFFICIAL. For the evaluation at the completion of design or engineering services, indicate the COR. For the evaluation at the completion of construction, indicate the Area Engineer or Resident Engineer. Give the name of the office, not just the office symbol.
- Item 15. NAME, TITLE AND OFFICE OF REVIEWING OFFICIAL. The Director/Chief, or Assistant Director/Chief, of Engineering.
- Item 19. CONSTRUCTION PHASE. The RE is responsible for addressing these attributes. Any aspect of A-E performance not adequately described by the ratings given in the matrix shall be described in Item 20. Examples of items that might require special comment are:
- Field visit support. Did the A-E firm provide the proper individual in a timely manner? Were written reports submitted in a timely manner? Did solutions to problems appear to be cost effective? Did the A-E firm provide information which contributed to the Government's defense against a claim or identification of a construction contractor deficiency?
 - Changes. Did the A-E firm provide designs to correct errors or omissions and/or revise criteria in a timely manner? Were the cost estimates useful/realistic in support of negotiations?
 - As-Built Drawings and Operation and Maintenance Manuals. Comment on the adequacy of the A-E firm's preparation or review of such documents, if applicable.
- Item 20. REMARKS. The comments should be tailored to be of maximum usefulness to selection boards considering this A-E firm for future work, and to the administrators of contracts with this firm in the future. If the effectiveness of the firm's project management is not adequately covered by Items 17 and 19, add comments as needed. Provide substantive comments to support a "marginal" or "unsatisfactory" evaluation and include any comments by the A-E firm in response to the proposed evaluation. Explain the basis for a "No" or "Conditionally" recommendation for future contracts in Item 13.